LESSONS LEARNED FROM REGIONAL CONSERVATION PLANNING EFFORTS

California Department of Fish and Game
www.dfg.ca.gov/nccp

LESSONS ABOUT COLLABORATION:

Involve All Affected Parties

-anticipate all interests that may be affected
-bring them in early, before any commitments are made
-create an atmosphere of trust
-foster "ownership" in the process by local interests
-local land use authorities (cities, counties) must be involved

Broad Base of Support

-identify the benefits of maintaining open space
-engage the participation of organizations and people: equestrians, local parks and rec., mountain bikers, CNPS, etc.
-consider the secondary benefits/relationship of an open space system to other regional land use issues (e.g. transportation, water and air pollution, housing, quality of life, etc.)
-identify common interests/objectives

Clearly State Objectives

-as a group, create specific objectives for the process (e.g. streamlined permitting, meet recovery goals, single plan for multiple jurisdictions, etc.)
-specify what you intend to accomplish (desired products, partnerships, reserves)
-establish how you will meet these objectives (collaboration structure, timelines, funding)

Use a Facilitator

-experienced, people-skilled facilitator, someone who:
  -is trusted by everyone
  -moves the process forward
  -controls "outliers"
  -has a sense for accomplishing goals

Be Open, Honest, Straight-forward, Respectful

-no secrets; no perception of hiding anything
-don't shy away from difficult issues; address them at the appropriate time
-be creative and open-minded; engage others with unique expertise
-respect each other's opinions; we each have a valid role to fulfill

(LESSONS ABOUT COLLABORATION: continued)

Incentives

-provide incentives (regulatory and other) to make the effort worthwhile to participants
-complete coverage for listed species; include non-listed species
-provide assurances that "a deal is a deal"; make them clear
-a healthy, balanced diet of carrots (incentives) and sticks (requirements) will ensure the best chance of keeping everyone involved and motivated

Leadership

-every plan needs a local champion who can motivate others
-the people assigned to the project need to be given the authority to make decisions, and then be able to make them; they need to be able to "close the deal"
-focus on the "big picture" gains and not the small losses
-invest time to visit elected officials and local management at their offices to establish open communication, visit without an agenda, and keep them informed
-strong relationships between local jurisdictions (cities and counties) will be essential to plan success

Build Trust

-the regulatory way is not always the best way
-encourage creativity; think "outside the box"
-project staff must have good people skills
-build relationships among the group; get to know each other to reduce thinking only of each other in your roles; have meals together, evening socials, and field trips
-consult early and often with the wildlife agencies

Commitment

-the process is not over when the planning is completed
-training for agency staff (local, state, federal) to understand the details of the plan
-integration of the plan components into all appropriate business practices
-learning to trust each other to follow the terms of the plan (avoid excessive oversight)
-building and maintaining trust among partners is an ongoing task

LESSONS ABOUT BIOLOGICAL ISSUES:

Comprehensive Conservation Objectives

-include all natural communities and habitat features
-address multiple species (both listed and not) and ecological functions
-clearly articulate the conservation standard necessary for plan approval
-set clear, measurable biological goals

Regional Context

-identify the planning area to address a biogeographic region defined by ecosystem features
-create conservation objectives and a reserve system design to fit with adjacent conservation efforts
-spatial characteristics of biological features of interest are important

Scientific Foundation

-"front load" the process with a strong scientific foundation
    -consult with independent science advisors early in the process
    -identify data needs early
    - "check in" with the science advice at decision points
-acknowledge realities of planning at a regional scale
    -sacrifice some level of data detail for larger geographic coverage
    -using "keystone" or "umbrella" species and other indicators
    -general reserve design tenets increase in importance, site-by-site detail decreases
    -a map-based conservation strategy is very important

Geographic Information Systems (GIS)

-conservation problems and solutions are spatial in nature
-almost all relevant data are explicitly spatial
-technology allows for virtually unlimited queries and models; "what if" scenarios can be explored
-graphic output (maps) is unsurpassed at conveying information

Monitoring and Adaptive Management

-keep monitoring and management separate, but develop an integrated approach
-begin designing a program early in plan development (don't leave until last)
-base it on the biological goals
-collaborate across plan boundaries; standardize regionally

LESSONS ABOUT THE PROCESS:

Funding

-the availability of money dedicated to this purpose will dictate the pace and outcome of the process

-upfront funding to begin serious planning is crucial for several reasons, one of which is to maintain momentum

-create a funding "toolbox" for implementation; explore all options (development fees, tipping fees, habitat assessment districts, local bond measures, sales tax, etc.)

-land acquisition is normally a component of the process: start early and explore all options (e.g. land exchanges, raising funds through a variety of efforts, tax incentives, TDRs, etc.)

-spread the responsibility equitably

Other Important Tips

-build a common language (terminology) early and use it consistently

-begin at the end, i.e. set goals based on the specific criteria for making permit findings

-consult with the wildlife agencies together - early and often

-be mindful of local politics and timing of elections; long planning time frames and shorter political terms

-employ local consultants who are knowledgeable about conservation planning and are well-respected

-learn about tactics from other plans; read them, meet with experienced people

-be as specific as possible in writing the plans to avoid disagreements later

  -craft a plan that will help the wildlife agencies let go of project-by-project review

-hire a technical editor for writing the final plans

-stay committed to the partnerships even after permits are approved

  -requires ongoing interpretation of the plans - "we knew what we meant at the time…"

-seek partnerships for implementation – shared acquisitions, monitoring and management, data, regional funding